

## ***Taxation statistics 2009–10***

### **Table 7: Trust returns**

#### **Trusts, by type, 1996–97 to 2009–10 income years<sup>1,2</sup>**

##### **Notes:**

- \* The symbol 'n.a.' used in this publication means not applicable or not available.
- \* Totals may not equal the sum of components due to rounding.
  
- \* In order to meet privacy regulations, the following measures have been applied.
  - (a) Number indicators shown may have been rounded to the nearest multiple of 5.
  - (b) Statistics for some items may not be included in some tables.
  
- \* This time series table includes trust income tax returns processed by 31 October 2011 and those returns processed within 1 July to 31 October of each income year.
  
- 1 The statistics for the 2009–10 income year were sourced from 2010 trust income tax returns processed by 31 October 2011. The statistics are not necessarily complete. For further information please refer to the 'Source of trust statistics' section in the 'Trusts' chapter of *Taxation statistics 2009–10*.
  
- 2 The 1996–97 to 2007–08 income year statistics reported in this table may not match the statistics reported in previous editions of *Taxation statistics* because the statistics for these income years have been updated in this edition to account for returns processed by 31 October 2011.
  
- 3 Includes invalid trust types and those trusts that did not state a type.

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#### **Trusts, by type, 1996–97 to 2009–10 income years<sup>1,2</sup>**

**Trust returns processed within 1 July to 31 October of each income year**

	1996–97	1997–98	1998–99	1999–2000	2000–01
Discretionary trust - main source from investment	153,341	161,523	163,307	162,096	161,709
Discretionary trust - main source from trading	118,941	126,670	127,664	126,476	126,036
Unit trust	53,353	63,024	64,263	62,803	61,451
Deceased estate	46,467	44,504	41,690	39,711	39,950
Discretionary trust - main source from service-management	38,859	40,379	40,093	39,002	36,726
Other fixed trust	15,471	16,309	16,260	15,555	16,160
Hybrid trust	2,008	2,594	2,720	2,693	3,127
Public unit trust - unlisted	581	781	901	1,014	1,886
Cash management unit trust	762	614	593	537	475
Public unit trust - listed	429	283	287	297	248
Other <sup>3</sup>	n.a.	n.a.	n.a.	n.a.	n.a.
<b>Total</b>	<b>430,227</b>	<b>456,681</b>	<b>457,778</b>	<b>450,184</b>	<b>447,768</b>

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**Trust returns processed within 1 July to 31 October of each income year**

	2001–02	2002–03	2003–04	2004–05	2005–06
Discretionary trust - main source from investment	167,064	173,913	188,404	202,359	219,713
Discretionary trust - main source from trading	129,923	135,877	146,918	159,103	172,152
Unit trust	62,339	63,580	66,002	68,163	70,807
Deceased estate	39,263	39,128	39,780	40,454	41,344
Discretionary trust - main source from service-management	36,003	36,227	36,375	36,317	36,402
Other fixed trust	14,520	14,257	14,344	17,719	17,925
Hybrid trust	3,510	4,004	4,806	5,449	6,287
Public unit trust - unlisted	2,575	2,893	3,180	3,658	3,937
Cash management unit trust	490	465	447	491	538
Public unit trust - listed	282	295	307	386	441
Other <sup>3</sup>	n.a.	1,516	1,355	1,246	1,271
<b>Total</b>	<b>455,972</b>	<b>472,155</b>	<b>501,918</b>	<b>535,345</b>	<b>570,817</b>

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**Trust returns processed within 1 July to 31 October of each income year**

	2006–07	2007–08	2008–09	2009–10
Discretionary trust - main source from investment	238,815	261,511	262,708	281,272
Discretionary trust - main source from trading	186,594	205,938	209,435	225,334
Unit trust	73,973	77,045	75,551	78,554
Deceased estate	42,857	43,912	41,921	43,142
Discretionary trust - main source from service-management	37,076	38,037	36,445	37,818
Other fixed trust	18,522	18,496	17,115	16,997
Hybrid trust	7,647	8,884	9,162	9,726
Public unit trust - unlisted	4,291	4,774	4,635	4,911
Cash management unit trust	579	581	562	551
Public unit trust - listed	508	454	377	373
Other <sup>3</sup>	1,205	1,409	1,833	3,400
<b>Total</b>	<b>612,067</b>	<b>661,041</b>	<b>659,744</b>	<b>702,078</b>

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### **Table 7: Trust returns**

#### **Trusts, by type, 1996–97 to 2009–10 income years<sup>1,2</sup>**

##### **Trust returns processed by 31 October 2011**

	1996–97	1997–98	1998–99	1999–2000	2000–01
Discretionary trust - main source from investment	162,070	172,415	176,990	180,650	179,860
Discretionary trust - main source from trading	126,180	135,655	139,650	143,195	142,895
Unit trust	57,675	68,845	71,280	72,420	70,155
Deceased estate	49,645	47,715	45,620	44,410	44,720
Discretionary trust - main source from service-management	41,225	43,340	44,020	44,435	41,480
Other fixed trust	15,790	16,820	16,945	16,285	16,800
Hybrid trust	2,140	2,825	3,010	3,105	3,560
Public unit trust - unlisted	900	1,280	1,490	1,680	2,295
Cash management unit trust	865	695	675	610	555
Public unit trust - listed	470	335	340	360	285
Other <sup>3</sup>	n.a.	n.a.	n.a.	n.a.	n.a.
<b>Total</b>	<b>456,980</b>	<b>489,930</b>	<b>500,020</b>	<b>507,145</b>	<b>502,605</b>

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### **Table 7: Trust returns**

#### **Trusts, by type, 1996–97 to 2009–10 income years<sup>1,2</sup>**

##### **Trust returns processed by 31 October 2011**

	2001–02	2002–03	2003–04	2004–05	2005–06
Discretionary trust - main source from investment	184,045	192,080	208,675	225,165	243,090
Discretionary trust - main source from trading	145,795	151,460	163,050	176,625	191,020
Unit trust	70,115	71,065	73,715	75,865	78,450
Deceased estate	43,680	43,735	44,495	45,475	46,270
Discretionary trust - main source from service-management	40,215	40,110	40,275	40,325	40,310
Other fixed trust	15,200	14,940	15,035	18,510	18,660
Hybrid trust	4,010	4,540	5,425	6,155	7,090
Public unit trust - unlisted	2,830	3,115	3,420	3,815	4,120
Cash management unit trust	555	530	520	565	615
Public unit trust - listed	320	320	345	435	480
Other <sup>3</sup>	n.a.	1,910	1,780	1,705	1,695
<b>Total</b>	<b>506,765</b>	<b>523,800</b>	<b>556,740</b>	<b>594,635</b>	<b>631,795</b>

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##### **Trust returns processed by 31 October 2011**

	2006–07	2007–08	2008–09	2009–10
Discretionary trust - main source from investment	262,480	279,460	286,010	281,270
Discretionary trust - main source from trading	206,640	219,975	227,270	225,335
Unit trust	81,430	83,195	81,920	78,555
Deceased estate	47,425	47,800	46,355	43,140
Discretionary trust - main source from service-management	40,800	40,550	39,670	37,820
Other fixed trust	19,310	19,085	17,745	16,995
Hybrid trust	8,540	9,620	10,045	9,725
Public unit trust - unlisted	4,485	4,930	4,945	4,910
Cash management unit trust	640	635	615	550
Public unit trust - listed	535	475	410	375
Other <sup>3</sup>	1,580	1,740	2,165	3,400
<b>Total</b>	<b>673,870</b>	<b>707,460</b>	<b>717,150</b>	<b>702,080</b>